

## Agency Administrator Bill Enrollment and Agency Request System (BEARS)

### Agency Administrator

Cabinet agencies are required to receive approval from the governor prior to submitting Agency Request legislation to the legislature. The review and approval process starts with the development of the Agency Request legislation package to be submitted to OFM for further analysis and then on to the governor’s office.

- ✓ The BEARS application allows users to create, prepare, review, withdraw and/or delete an Agency Request based on roles and permissions assigned. This document focuses on those tasks specific to the role of Agency Administrator.
- ✓ The following Agency Administrator tasks are covered in this job aid:
  - Creating a Draft Agency Request
  - Deleting an Agency Request
  - Submitting an Agency Request
  - Resubmitting an Agency Request
  - Withdrawing an Agency Request

To create a user account for BEARS, complete the [BEARS Security Request form](#) for the application. Keep in mind only one role can be assigned per user, information on roles and permissions can be found in the [Roles and Permissions Guide](#).

- ✓ BEARS can be accessed using Chrome, Firefox, or Microsoft Edge. Access [BEARS application](#).
- ✓ For training members of your agency on BEARS, please visit the [BEARS training environment](#).
- ✓ For more information about BEARS and training materials, please visit the [BEARS web page](#).
- ✓ For additional information about becoming a BEARS user, contact the OFM Help Desk.



[HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov) **360.407.9100**

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## Agency Administrator Bill Enrollment and Agency Request System (BEARS)

### Home Page

After logging into BEARS as an Agency Administrator the Landing Screen provides the following information:

The screenshot shows the BEARS Agency Administrator Home Page. The interface includes a top toolbar, a left sidebar, a main content area with a table of Agency Requests, and a bottom section for Dates of Interest, Documents, and Links. Red callout boxes point to these elements with the following descriptions:

- Toolbar - located near the top of all pages**: Includes Agency, Session, Help and Logout
- Page Header**: Session, Agency Request ID - Agency Request Title (*Request Status*)
- Withdraw, New, View/Edit and Delete**: The buttons located in the header for Withdraw, New, Edit and Delete are available based on the status of the request and visible based on roles and permissions. As an admin all are visible.
- Dates of Interest, Documents and Links**:
  - Dates of Interest
  - Documents – Documents relating to Agency Requests or Legislation
  - Links
- Agency Requests**: List of all Agency Requests for your agency in the session. Sortable/filterable columns in the list include – Agency Request ID, Department Request #, Title, Program Status, Status Change Date
- Sidebar or Left Nav**: Populates with workflow components for the Agency Request selected. Note: for smaller screen sizes the sidebar can collapse and show only icons for each
- All Agency Requests**: Agency Request ID, Department Request #, Title, Program Status, Status Change Date for each Agency Request

- ❑ **Toolbar - Located near the top of all pages**
  - Agency – the agency assigned
  - Session – Current Session (In the future Sessions will be a drop down and the content will be view only)
  - Help – Help provides the phone number and an email link to contact the OFM Helpdesk
- ❑ **Sidebar or Left Nav - Populates with workflow components to complete an Agency Request after it is created or selected for editing**
- ❑ **Page Header - Session, Agency Request ID - Agency Request Title (*Request Status*)**
- ❑ **Agency Requests - List of all Agency Requests for your agency in the session**  
sortable/filterable columns in the list include – Agency Request ID, Department Request #, Title, Program Status, Status Change Date
- ❑ **Withdraw, New, Edit and Delete - Withdraw, create new, edit, and delete an Agency Request are all enabled based on role assignment and the status of the Agency Request**

**Important:** If the Agency Request is being completed by an Agency Analyst, the Agency Administrator is responsible for creating the initial draft of the Agency Request, **manually assigning** the work to an Agency Analyst, reviewing the completed work, and submitting the Agency Request to OFM.



## Create an Agency Request

### 1. Select:

→ After logging into Bears, Select the **New** button (Shortcut key: alt+shift+n)



### 2. Input:

→ On the **General Information** screen enter any of the information available for the Agency Request. The following are required:

- Title:** Enter a title for the Agency Request
- Related Agency Request:** Select a radio button that applies to the Agency Request being created

**Note:** The Final Z-Draft Number is required prior to submittal, but not to save the form.

**Note:** Title and Related Agency Requests are required to save, all other fields are optional for saving a new Agency Request. The Final Z-draft number will be required prior to submittal.



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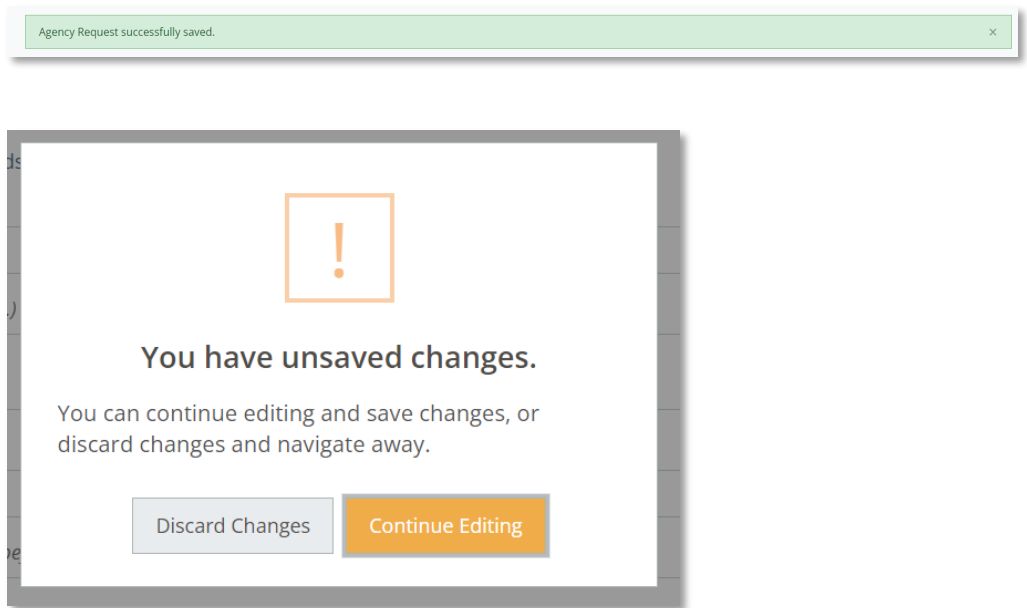
### 3. Save (Successful):

→ If the save is successful, a message stating that the “Agency Request successfully saved.” will appear in a green banner above the **General Information** header. It can be dismissed or will retire on its own in several seconds.

→ Navigate away without saving changes and a warning message with the following options appears:

“You have unsaved changes.”

- Discard Changes - navigates away without saving
- Continue editing - returns to the General information screen



### 4. Save (Unsuccessful):

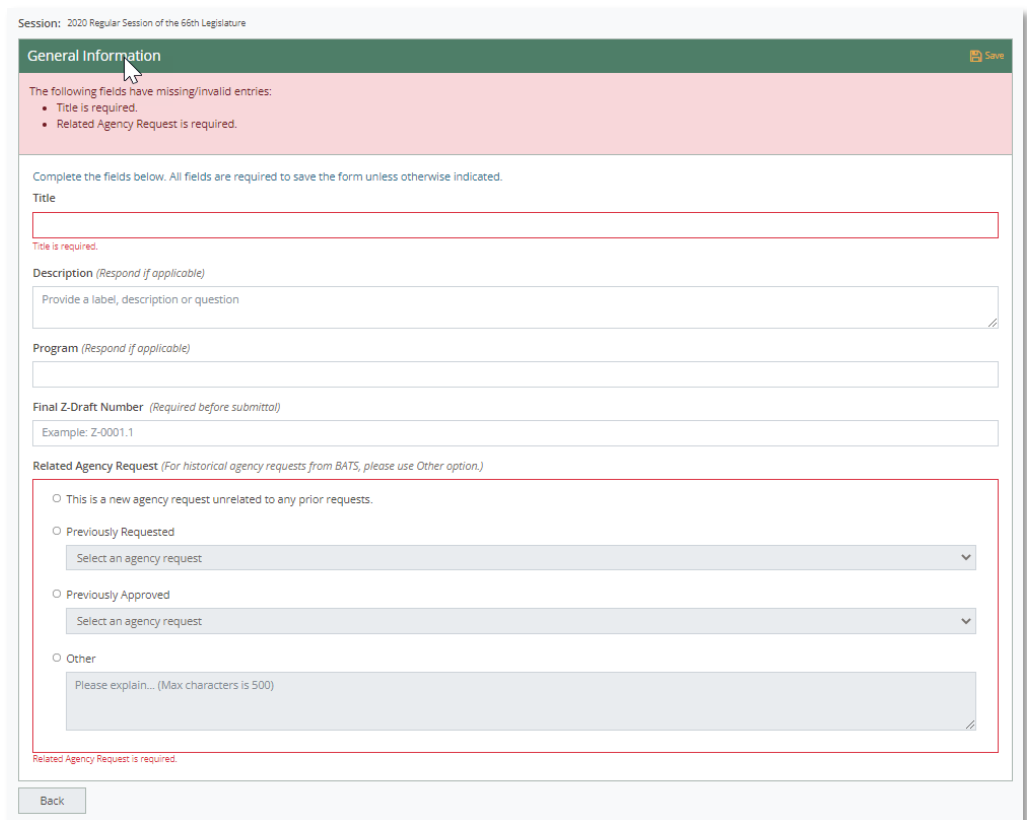
→ When save is unsuccessful the following red banner appears at the top of the screen under the **General Information** header

“The follow fields have missing/invalid entries:

- Title is required.
- Related Agency Request is required.”

→ The requirements are also noted in the alerts under each field and outlined in red.

**Note:** The Save button (alt+shift+s) is not enabled until an entry has been made within the form. Validation will not be displayed until either the required field is skipped OR an invalid entry has been made and the form is saved.





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### 5. Save (Unsuccessful):

→ A save is unsuccessful when a Related Agency Request “Other” is selected and an explanation is not entered, or

→ A save is unsuccessful when a Z-draft number of an inappropriate format is entered

→ A validation summary appears at the top of the screen under the **General Information** header

The follow fields have missing/invalid entries:

- The Z-Draft Number must be the correct format: Z-(0001-9999).(1-999) Example: Z-0001.1
- An explanation is required

**General Information** Save

The following fields have missing/invalid entries:

- The Z-Draft Number must be in the correct format: Z-(0001-9999).(1-999). Example: Z-0001.1
- An explanation is required.

Complete the fields below. All fields are required to save the form unless otherwise indicated.

**Title**

**Description** *(Respond if applicable.)*

**Program** *(Respond if applicable.)*

**Final Z-Draft Number** *(Required before submittal.)*

The Z-Draft Number must be in the correct format: Z-(0001-9999).(1-999). Example: Z-0001.1

**Related Agency Request** *(To provide reference to a prior agency request from BATS, please use "Other" option and enter the title and session.)*

This is a new agency request unrelated to any prior requests.

Previously Requested

Select an agency request

Previously Approved

Select an agency request

Other

Please explain... (Max characters is 500)

An explanation is required.

**Important:** Once a Draft Agency Request is created, the Agency Administrator can assign it to an Agency Analyst via Outlook Email to complete or the Agency Administrator can complete the Agency Request without assigning it to an Analyst.



## Delete an Agency Request

### 1. Select:

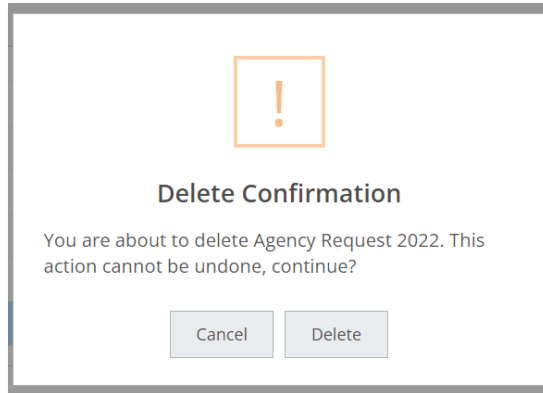
→ The Agency Request can be selected by checking the checkbox and selecting the **Delete** button (alt+shift+x) to delete the Agency Request if it was created in error

→ When deleting an Agency Request, the following confirmation is presented:

“You are about to delete! This action cannot be undone, continue?”

- Cancel** closes on the **Agency Request** screen
- Delete** button in the popup removes the Agency Request from the list.

**Note:** Deleting removes all information, pertaining to the Agency Request, from the list and from the database.





### Submit an Agency Request

#### 1. Select:

→ After logging in as the Agency Administrator

→ Navigate to the **Review** screen via the Left Sidebar Navigation or the **Continue** button from the Attachments screen

#### 2. Review:

→ A validation message at the top of the screen displays which sections need additional information added:

“The following sections have missing invalid entries:

{Name of section and field}

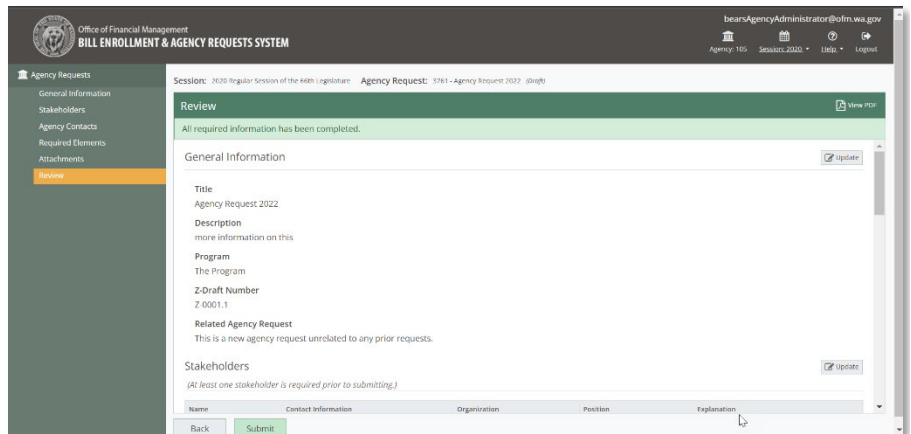
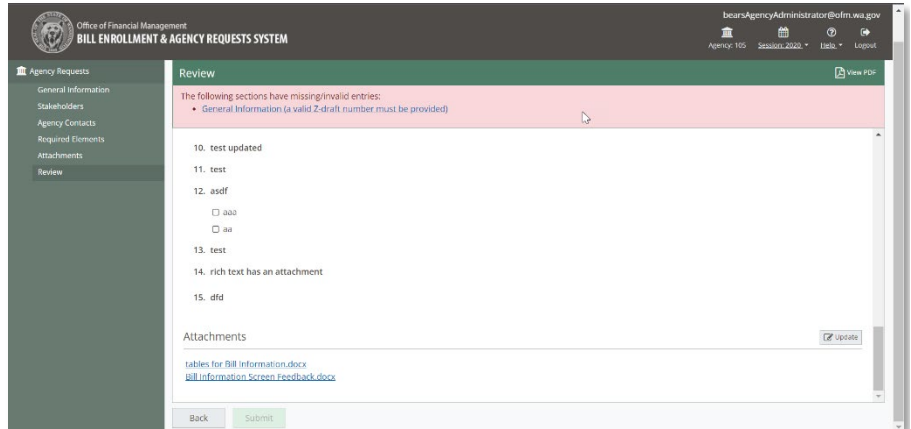
→ Each section of the Review screen has an **Update** button

→ Clicking on **Update** navigates to the corresponding page to add the necessary information

→ When all required information is complete, the following success validation message is provided:

“All required information has been completed.”

→ By clicking on the **View PDF** button (alt+shift+p) a PDF is generated containing all information entered.



**3. Submit:**

→ Selecting the **Back** button navigates back to the **Attachments** screen and selecting the **Submit** button submits the Agency Request to OFM

After submitting the following confirmation is presented:

“Submit Agency Request

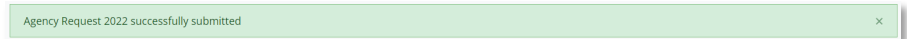
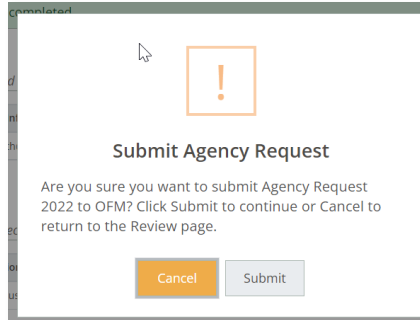
Are you sure you want to submit {Title of Agency Request} to OFM? Click Submit to continue or Cancel to return to the Review page.

- Cancel** closes the modal and displays the Review screen without submitting the agency request
- Submit** submits the Agency Request to OFM

→ Once the Agency Request has been submitted a validation message indicating that it was successfully submitted is presented.

→ The Agency Analyst or Agency Administrator can make changes to the Agency Request after it is submitted. If any changes are made after the Agency Request is submitted it will need to be **Resubmitted** by the Agency Administrator.

**Note:** If the status of the Agency Request has progressed to **OFM Review**, only the attachments can be edited. If the attachments are edited, the Agency Request will need to be **Resubmitted** by the Agency Administrator and the status stays as OFM Review





### Resubmit an Agency Request

#### 1. Resubmit Page Alert:

→ If changes have been made to an Agency Request after it has been submitted and the status is still submitted the following page alert appears:

“Changes have been made since the last submittal on {Insert date, format mm/dd/yyyy}. To notify OFM of any changes, resubmit by navigating to the [Review screen](#) (hyperlink to the Review screen).”

→ By clicking on the link in the page alert the user be navigated to the **Review** screen to resubmit the Agency Request.

#### 2. Resubmit:

→ After navigating to the **Review** screen for the Agency Request, the **Submit** button is replaced with a **Resubmit** button

→ When the Agency Administrator selects the **Resubmit** button the following message appears:

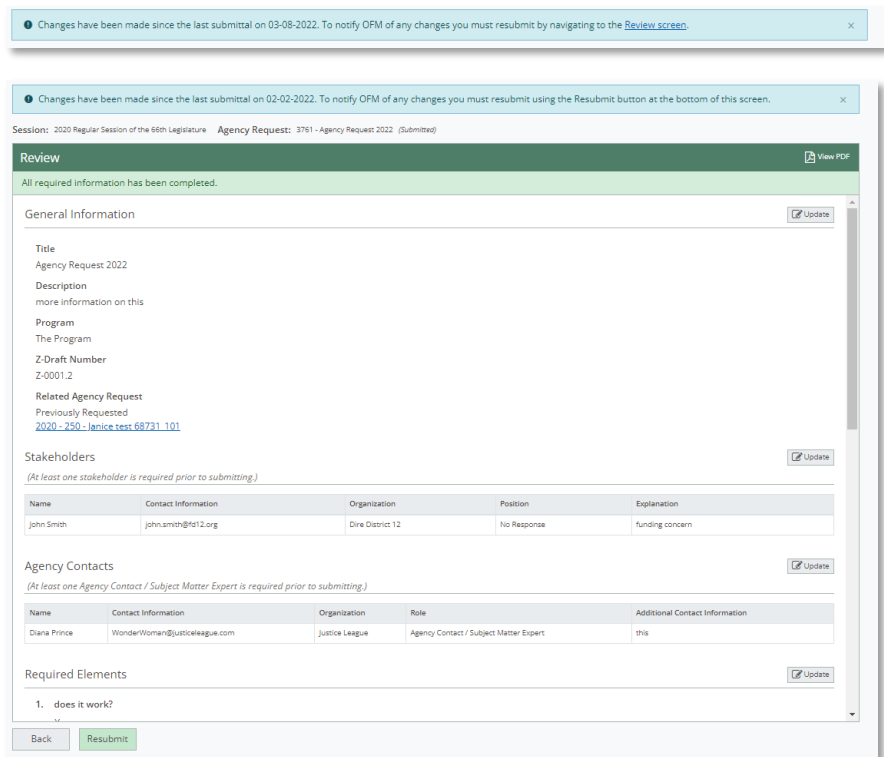
“Resubmit Agency Request

Are you sure you want to resubmit Agency Request 2022 to OFM? Click **Resubmit** to continue or **Cancel** to return to the Review page.”

→ Select the **Cancel** button to remain on the **Review** screen with no changes

→ Select the **Resubmit** button resubmit the Agency Request. The status remains Submitted.

→ If the status of the Agency Request has progressed to **OFM Review**, only attachments can be edited. If the attachments are edited, the Agency Request will need to be **Resubmitted** by the Agency Administrator and the status remains as **OFM Review**.



Changes have been made since the last submittal on 03-08-2022. To notify OFM of any changes you must resubmit by navigating to the [Review screen](#).

Changes have been made since the last submittal on 02-02-2022. To notify OFM of any changes you must resubmit using the Resubmit button at the bottom of this screen.

Session: 2020 Regular Session of the 66th Legislature Agency Request: 3761 - Agency Request 2022 (Submitted)

#### Review

All required information has been completed. [View PDF](#)

General Information [Update](#)

Title  
Agency Request 2022

Description  
more information on this

Program  
The Program

Z-Draft Number  
Z-0001.2

Related Agency Request  
Previously Requested  
[2020 - 250 - Justice test 68731-101](#)

Stakeholders [Update](#)

(At least one stakeholder is required prior to submitting.)

Name	Contact Information	Organization	Position	Explanation
John Smith	john.smith@fd12.org	Dire District 12	No Response	funding concern

Agency Contacts [Update](#)

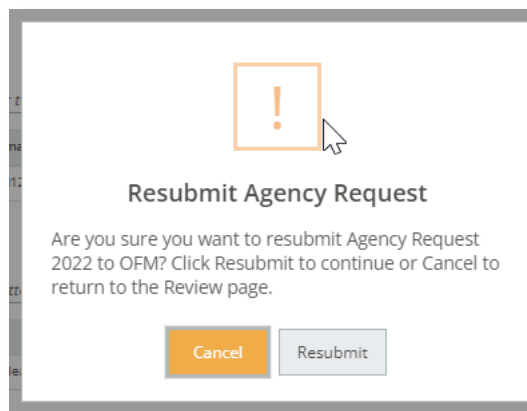
(At least one Agency Contact / Subject Matter Expert is required prior to submitting.)

Name	Contact Information	Organization	Role	Additional Contact Information
Diana Prince	WonderWoman@JusticeLeague.com	Justice League	Agency Contact / Subject Matter Expert	this

Required Elements [Update](#)

1. does it work?

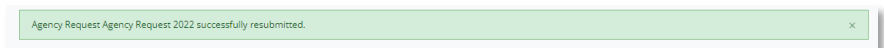
[Back](#) [Resubmit](#)



**Resubmit Agency Request**

Are you sure you want to resubmit Agency Request 2022 to OFM? Click Resubmit to continue or Cancel to return to the Review page.

[Cancel](#) [Resubmit](#)



Agency Request Agency Request 2022 successfully resubmitted.



## Agency Administrator Bill Enrollment and Agency Request System (BEARS)

### Withdraw an Agency Request

#### 1. Select an Agency Request to Withdraw:

- Any Agency Request can be withdrawn by the Agency Administrator
- OFM can request an agency to withdraw an agency request. The Status in this case is **Withdraw Requested**.

#### 2. After selecting the Agency Request to withdraw, select the **Withdraw** button (alt+shift+w) in the header

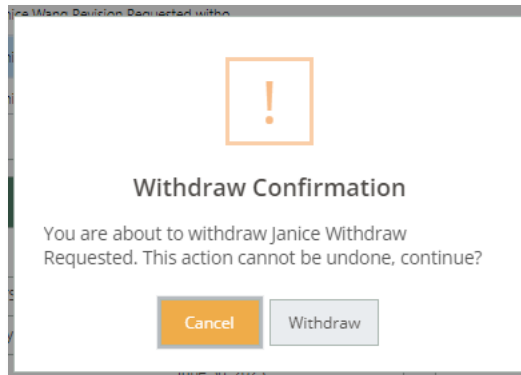
→ The following withdraw confirmation message modal appears:

“Withdraw Confirmation  
 You are about to withdraw {Name of file}. This action cannot be undone, continue?”  
 Followed by the **Cancel** or **Withdraw** buttons:

→ Select **Cancel** to navigate back to the **Agency Request** list screen

→ Select **Withdraw** to leave the Agency Request in the list with a status of **Withdrawn**. An Agency Request with this status is read-only

Agency Request ID	Title	Program	Status	Status Change Date
<input type="checkbox"/> 834	asdf	asdf	OFM Draft	08/04/2021, 02:34 PM
<input type="checkbox"/> 521	asdf		OFM Review	02/02/2021, 09:44 AM
<input type="checkbox"/> 766	asdf_updated		OFM Draft	06/15/2021, 09:42 AM
<input checked="" type="checkbox"/> 792	Agency Request 2022		Submitted	02/02/2022, 02:26 PM
<input type="checkbox"/> 3761	Agency Request 2022	The Program	Submitted	03/14/2022, 02:41 PM
<input type="checkbox"/> 823	Agency Request Legislation 2022	The Program	OFM Draft	08/03/2021, 05:09 PM
<input type="checkbox"/> 1601	another one	asdfkj	OFM Draft	12/03/2021, 10:55 AM



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## Agency Request Statuses

The following statuses will be visible in the list of Agency Requests accessible to the Agency Analyst and the Agency Administrator when logging into BEARS.

1. **Draft** – The initial Agency Request created by the Agency Administrator before it has been Submitted
2. **Submitted** – When the Agency Request has been submitted to OFM for Analysis by the Agency Administrator
3. **OFM Review** – When the Agency Request has been assigned to an OFM Analyst and is in the analysis process. The only part of an Agency Request that is editable in this case are attachments. If attachments are edited, the Agency Request will need to be resubmitted by the Agency Administrator
4. **Revision Requested** – When OFM requests additional information for an Agency Request before an analysis is Submitted. An Agency Contact will receive an email from OFM and after the additional information is added to the Agency Request either by the Agency Analyst or the Agency Administrator, it will need to be resubmitted by the Agency Administrator
5. **Withdraw Requested** – When OFM asks an Agency to withdraw an Agency Request from consideration an Agency Contact will receive an email from OFM and the status will be updated to **Withdrawn Requested**
6. **Withdrawn** – The Agency Administrator can withdraw an Agency Request when it is still in submitted status or in withdraw requested status. When an Agency Request is **Withdrawn** it becomes read-only and cannot be edited
7. **Returned** – When an Agency Request is rejected an Agency Contact will receive an email from OFM the status of the Agency Request will receive a read-only status of **Returned**
8. **Decision Made** – approved, the Agency Request was submitted to the governor's office with the associated OFM Analysis and approval, the **Decision Made** status is read-only